

Department of Administrative Services

**Bureau of Enterprise Systems and Technology**

## **Customer Engagement Profile**

### **Instructions for Use**

**Version 1.9**  
**(R1.00.40)**



## ABOUT DAS/BEST ENTERPRISE SERVICES

The enterprise services offered by the Department of Administrative Services' (DAS) Bureau of Enterprise Systems and Technology (DAS/BEST) are designed to provide Executive Branch agencies with access to high quality and cost-effective technology services. The bureau's service performance metrics are reviewed in a regular basis by the CIO as well as the Commissioner of DAS. The state's Enterprise IT Services Catalog is updated and published annually.

## QUESTIONS ABOUT THE FORM

This document was designed and developed by the Department of Administrative Services' Bureau of Enterprise Systems and Technology (DAS/BEST). Should you have any questions or comments regarding the Customer Engagement Profile, please contact the **DAS/BEST Enterprise Planning** by electronic mail at [best.workintake@ct.gov](mailto:best.workintake@ct.gov).



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## 1 Introduction

The DAS/BEST Customer Engagement Profile is designed to provide Executive Branch agencies with an efficient and consistent way to engage DAS/BEST in support of your agency priorities. This document provides an overview of the Engagement Profile as well as instructions for its use.

We hope that agencies find the Customer Engagement Profile productive and useful. At DAS/BEST, we strive for continual improvement; therefore, we welcome the comments and input of our customers on ways to improve this form or the DAS/BEST work intake process.

## 2 When to Use the Customer Engagement Profile

Customers who work with DAS/BEST may not always need to complete a Profile. The rule of thumb is that a Profile is needed when work is other than routine. **If you are unsure if you need a profile, then feel free to reach out to us at [best.workintake@ct.gov](mailto:best.workintake@ct.gov).** Please refer to the table below for guidance on determining when a Profile is needed.

Activity Scope	Activity Description
<b>Level One</b> <i>Ongoing Operations</i>	<b>Routine agency interaction with DAS/BEST</b> related non-project activities in the context of an existing service relationship that your agency has with DAS/BEST.  <b>An Engagement Profile is NOT required.</b> In place of a Profile, agencies would rely on the existing Request for Service (RFS) process.
<b>Level Two</b> <i>Project Related</i>	<b>Involves small to medium-sized Agency projects</b> that are expected create new service relationships between the agency and DAS/BEST. Level Two activities can include agency IT projects as well when an agency desires purchase and use DAS/BEST Enterprise Services.  <b>An Engagement Profile is required.</b>
<b>Level Three</b> <i>Project Related</i>	<b>Involves large, statewide projects and/or initiatives</b> that encompass multiple agency stakeholders and where DAS/BEST will be expected to provide networking, platform and application hosting services for architecturally complicated business system(s).  <b>An Engagement Profile is required.</b>
<b>IT Procurements</b>	<b>Agencies that anticipate the need to issue an ITB or RFP</b> in support of their agency's IT objectives. The ITB or RFP doesn't necessarily need to be related to a Level Two or Level Three project.  <b>An Engagement Profile is required.</b>



### 3 How to Make the Best of the Work Intake Process

Like any process, you will get as much out as you invest. Over time, DAS/BEST has compiled a list of suggestions that can help agencies make the best of the work intake process.

- ◆ **Engage DAS/BEST early in your project's lifecycle.** It's important for your agency to begin your relationship with DAS/BEST as soon as you recognize a need for our participation. For Level Two and Three projects, agencies should start to work with DAS/BEST during the Business Issues phase.
- ◆ **When in doubt, give us a call.** If you are not sure how to complete the form or you are unclear what services DAS/BEST might be able to provide your agency, don't hesitate to give us a call.
- ◆ **Don't forget Procurement.** If you know or believe that your project will include procurement activity related to an ITB or an RFP for IT goods and/or services, please be sure to consult with DAS procurement at (860) 713-5095 or at [weserveyou.das@ct.gov](mailto:weserveyou.das@ct.gov), prior to the submission of the Profile. Procurement timelines will need to be factored into your project plan. Agencies should also review the DAS Procurement [web site](#)<sup>1</sup> for additional information and guidance.
- ◆ **Review the state's IT Standards, Principles and Best Practices.** Agencies should be familiar with the state's existing [architecture standards, principles and practices](#)<sup>2</sup>.
- ◆ **Avoid making timetable commitments on behalf of DAS/BEST.** For agency planning purposes, DAS/BEST works with agencies on schedule commitments **after** design approval.

### 4 Submitting the Engagement Profile to DAS/BEST

The actual submission of a completed Engagement Profile is relatively straightforward. The steps below will guide agencies in the submission of their profile(s) to DAS/BEST

1. The Agency completes the Engagement Profile and ensures that the document is signed by the appropriate parties. Agencies are welcome to send in a draft version of the completed Word document for our review. This may be a beneficial option for any agency that has not had prior experience with the Profile process.
2. When submitting the Profile, agencies are encouraged to attach any additional information that they feel may help DAS/BEST gain additional understanding and insight into the engagement.
3. Once the Profile has been filled-out and signed, the Requestor should email a scanned copy of the completed profile to **DAS/BEST Enterprise Planning** at [best.workintake@ct.gov](mailto:best.workintake@ct.gov). Incomplete or unsigned forms will be returned to the sending agency for correction.
4. When the request is received, a tracking number will be generated which is used as the project tracking number for the length of this engagement.
5. Acceptance of the Profile by DAS/BEST will trigger the DAS/BEST Work Intake process. You will receive a confirmation email that contains the tracking number assigned to your engagement.

<sup>1</sup> <http://das.ct.gov/cr1.aspx?page=8>

<sup>2</sup> <http://www.ct.gov/doitservices/cwp/view.asp?a=3941&Q=466098&doitservicesNav=|>

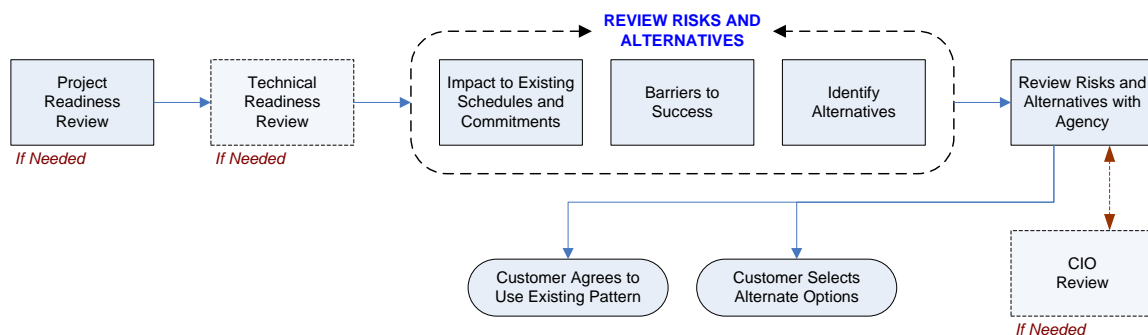




## 5 What Happens Next

Once your agency's Profile has been received by DAS/BEST, it will be reviewed internally and you should expect the following to occur:

1. You will be contacted by DAS/BEST within five business days of our receipt of your Profile.
2. Depending on the nature of the engagement, DAS/BEST may work directly with your agency to gather additional information and, if necessary, any supporting documentation prior to the formal review of your Profile by the Directors.
3. Your agency's Profile and any relevant information will then be forwarded to the DAS/BEST Executive Leadership Team, who will meet to review your engagement within two weeks of our initial receipt of the Profile. Based on the scope or complexity of the project, the Leadership Team may need to meet directly with the Requestor as part of that review.
4. Agencies submitting requests that call for accelerated timelines that may impact existing DAS/BEST commitments will follow an alternate review workflow, depicted in *Figure 5.1*. This is a collaborative process where DAS/BEST and the agency partner to work together to identify the most appropriate path to success.



**FIGURE 5.1 – EMERGENCY REQUEST REVIEW PROCESS**

5. Once your project has been reviewed by the Leadership Team, it will be transitioned to one of the DAS/BEST Service Divisions and a point of contact will be identified. This new point-of-contact will lead you through the next steps toward working to meet your agency's objectives.
6. The work intake process concludes with a communication to the agency about the Service Division assignment and informing your agency of your new point of contact at DAS/BEST.



## 6 Completing the Customer Engagement Profile Form

### 6.1 Completing Section I – Agency Information

Section I of the Customer Engagement Profile is intended to capture basic information about your agency. The values in these fields are length restricted. The phone number fields will automatically format your numeric input into the format “(nnn) nnn-nnnn.” Similarly, date fields will also format input of any valid date into the format “mm/dd/yyyy.”

SECTION I – AGENCY INFORMATION			
ENGAGEMENT TITLE: <input type="text"/>			
REQUESTOR'S NAME: <input type="text"/>		CONTACT PHONE: <input type="text"/>	
AGENCY / BUSINESS UNIT NAME: <input type="text"/>			
PROJECT MANAGER'S NAME (IF APPLICABLE): <input type="text"/>		CONTACT PHONE: <input type="text"/>	
AGENCY BUSINESS SPONSOR'S NAME: <input type="text"/>		CONTACT PHONE: <input type="text"/>	
AGENCY IT DIRECTOR'S NAME: <input type="text"/>		CONTACT PHONE: <input type="text"/>	
DATE REQUESTED: <input type="text"/>	DESIRED GO-LIVE DATE: <input type="text"/>	CURRENT PROJECT PHASE: <input type="text" value="Choose Phase..."/>	TYPE OF REQUEST: <input type="text" value="Choose one..."/>

While the information requested by this section of the form is self-evident, there are several fields that need further clarification:

#### Engagement Title

This is the title of your Engagement. If you are asking DAS/BEST to support a project, you can use your formal project name. Please note that this field is restricted to 32 characters due to a constraint that exists in our current tracking system.

#### Requestor's Name

The requestor is the individual who is expected to serve as the point of contact between DAS/BEST and your agency throughout the work intake process.

#### Agency Business Sponsor

We ask agencies to identify an individual that is authorized to represent that agency's business interests. Typically, this individual is empowered to make decisions on behalf of the agency's business operations. This individual is a key resource when business requirements require further clarification or when changes may be needed.



For agency projects, please identify either the Executive Sponsor or the Business Manager. It's more practical to use the Business Manager because this is the individual responsible for ensuring that the project's business outcomes are achieved. Although you may be asking DAS/BEST to help your agency achieve a set of technical objectives, these exist to meet a business need. Therefore, business representation is critical throughout the life of your engagement.

### Project Manager

Project Managers are the individuals who are responsible for mapping out the sequence of activities, effort, timelines and resources needed to accomplish the goals of the project. If your agency is engaging DAS/BEST in support of a project, we ask that you identify the individual you have assigned to manage this project. DAS/BEST will need to work with that person as our primary point of contact regarding activities, effort, timelines and resources associated with any work required of DAS/BEST.

## 6.2 Completing Section II – Business Objectives

Agencies are asked to provide a short explanation of the business objectives of this engagement. This is limited to 750 characters. Agencies have the option of attaching supporting documents, if needed. DAS/BEST, isn't asking you to supply a business case; rather, we are looking to understand what business outcomes you are hoping to achieve. This helps DAS/BEST better understand what services you may need.

SECTION II – BUSINESS OBJECTIVES
Please provide a brief description of the business objectives for this request. <div></div>
Is this mandated by federal or state statute or regulation? <input type="text" value="No"/>
Is there additional documentation attached? <input type="text" value="No"/>





## 6.3 Completing Section III – Services Requested of DAS/BEST

Section III is where your agency provides information that will help DAS/BEST understand what you believe your technical needs to be. It's best to avoid providing detail technical specifications. Instead, keep the dialog focused on outcomes. DAS/BEST and the agency will have the opportunity to talk about the technical requirements in more detail as the Profile works its way through the intake process. This section is limited to 1,024 characters. A sample of Section III is provided below.

### SECTION III – SERVICES REQUESTED OF DAS/BEST

Please provide a brief description of the support you are asking of DAS/BEST.

*To help meet our business objectives, our agency has identified a commercial product called "Super Widget" from Widget's Inc. that is expected to rely on data from our existing SQL Server database to deliver widget data to the public. This new system will incorporate some GIS data and will allow the public to query data. This system will not need any special security for users. Direct access will be permitted.*

*We believe that it may be appropriate for DAS/BEST to host this COTS application. In addition, the data used by this system is currently housed at our agency, so we'd be looking to DAS/BEST for guidance on how to ensure that the "Super Widget" system will have access to the most current widget data.*

## 6.4 Completing Section IV – Project Planning

No matter the activity, agencies will need to ensure that they have developed a timeline that appropriate to the objectives and scope of the project.

There is a drop-down Status field that is designed for agencies to communicate the current status of a given phase. The values for this are: Not Applicable, TBD, Completed, Active and Estimated.

### SECTION IV – PROJECT PLANNING

Project Phase	Status	Start	Finish
Business Issues	Choose Status...		
Requirements	Choose Status...		
Procurement (ITB or RFP)	Choose Status...		
Design	Choose Status...		
Construction	Choose Status...		
Testing / Quality Assurance	Choose Status...		
Implementation	Choose Status...		
Post-Implementation	Choose Status...		
Will this project depend on work that <b>must</b> be performed by other state agencies? <b>No</b>			
Has a formal project plan been developed for this project? <b>No</b> (If yes, please provide a copy with this Profile)			



In this section, agencies supply their current phase dates. As noted previously, the date fields will also format the input of any valid date into the format “mm/dd/yyyy.”

*The Requirements Phase is a critical phase for the engagement of DAS/BEST and your agency. DAS/BEST involvement during Requirements gathering will help ensure that your agency has gathered all of the critical design criteria for DAS/BEST-hosted systems. This will greatly streamline the time needed to complete the Design Phase.*

## 6.5 Completing Section V – Procurement Support

If your agency anticipates some form of procurement activity in relation to an information technology-based initiative, you should complete Section V.

*The participation of DAS Procurement will be required for any agency that anticipates the need to publish an ITB, RFQ or an RFP that involves IT goods and/or services. In that event, **Agencies are asked to contact DAS Procurement prior to the submission of your Profile to DAS/BEST.***

SECTION V – PROCUREMENT SUPPORT	
<input type="checkbox"/> Solution and/or System Integrator Procurement(s) <input type="checkbox"/> High Volume Procurement(s) <input type="checkbox"/> Acquisition of a Federal Transfer System <input type="checkbox"/> Acquisition of a State Transfer System	<input type="checkbox"/> Invitation to Bid (ITB) <input type="checkbox"/> Request for Qualifications (RFQ) <input type="checkbox"/> Request for Proposals (RFP)
Has your agency already engaged an outside vendor on this project? <input type="checkbox"/> No (If Yes, please list the vendors below.)	
Vendor Name(s)	Purchasing Authority
<input type="text"/>	Choose one...
<input type="text"/>	Choose one...

## 6.6 Completing Section VI – Agency Approvals

Because your agency’s request for DAS/BEST services will involve the commitment of DAS resources and may result in a recurring service cost to your agency, the Engagement Profile Request requires formal agency review and approval.

Agency IT Managers are asked to review and approve Customer Engagement Profiles to ensure that you have had the opportunity to provide input into your agency’s use of information technology as well as conformance to state IT policy, standards, and best practices.